Jigsaw Research

Convenience Stores Change 4Life Research

Report of Findings

Prepared for

Department of Health

Department of Health

September 2009

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Description	The Change4Life Convenience Stores project is to promote the purchase of fresh fruit and vegetables in deprived areas. The pilot phase was carried out in the North East of England. Jigsaw Research were commissioned to evaluate the sustainability of behaviour change as a result of the pilot phase of the programme. This document is Annex D to the main Evaluation Report.
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Contents

1. Executive Summary

1.1. Background and objectives

The Convenience Stores Change4Life programme is a partnership initiative between the Association of Convenience Stores and the Department of Health which aims to increase the availability of healthy options in convenience stores, initially focusing on fresh fruit and vegetables.

The programme has several objectives, with those of greatest pertinence to this research being:

To increase sales of fruit and vegetables by focusing on improving range, merchandising, quality and communication in stores

To drive awareness of fruit and vegetables to the consumer through good signposting within retail stores facilitating the Change4Life brand.

The North East region was been selected as the location for Phase 1 of the Convenience Stores Change4Life programme and an initial pilot across 12 development stores has been implemented.

Jigsaw Research was commissioned as an independent organization to evaluate the impact of these in-store changes and to design and carry out a research programme designed to address the following specific objectives:

- To assess changes in consumer awareness of the importance of buying fruit and vegetables
- To measure awareness of the healthy eating initiatives in the pilot stores
- To identify changes in consumer perceptions of the pilot stores
- To describe changes in shopping habits in relation to use of the pilot stores for the purchase of fruit and vegetables
- To assess changes in desire to buy fruit and vegetables amongst consumers shopping at the pilot stores
- To assess awareness and impact of the various in-store elements
- To evaluate which components/combination of components are most effective in reaching consumers
- To evaluate the impact of the wider Change 4Life campaign on purchasing of fruit and vegetables from the test stores.

1.2. Methodology and sample

Methodology

The adopted approach was that of a classic pre and post test. Interviews were conducted in stores just weeks before the changes (Pre-test) and then immediately after the changes (Post-test Wave 1). This provided the Department with a picture of the pilot's immediate impact, but could not predict any longer term, sustained impression on shoppers' awareness or behaviour. With this in mind, two subsequent waves were conducted approximately 4 months and then 7 months after the in-store changes.

Interviewing took place in the following periods:

Pre-test: 22nd October – 2nd November 2008

Post-test: Wave 1: 5th- 13th December 2008

Wave 2: 24th – 29th March 2009

Wave 3: 23rd – 28th June 2009

In order to ensure all segments of the stores' shopper base were included, interviewing was undertaken to cover all times of the shopping day, and both weekdays and weekends. Shift times were mimicked in post-test waves to give further comparability to results.

Four of the twelve pilot stores were included in the survey, each visited at each stage of the programme and were as follows:

- Costcutter, West Cornforth
- Londis, Silksworth
- Spar, Blakelow
- Londis, Wardley

Prior permission to interview in the stores was obtained by the Department of Health.

Sample Profile

Shoppers were approached as they left the store, with all shoppers aged 16 or over eligible for interview, regardless of whether they had bought fruit or vegetables on that occasion. Interviews lasted approximately 8 minutes.

The table below shows the number of interviews achieved in each phase of the study:

Pre-test	Post- test: Wave 1	Post- test: Wave 2	Post- test: Wave 3
n = 288	n = 285	n = 288	n = 282

The demographic profile of the shoppers remained broadly consistent over the 4 waves of the research:

- The majority of shoppers were age 35 years or over; around one fifth were 65+ and a similar proportion were young than 35 years old
- Over half of the shoppers came from SEG DE and a further one third from SEG C1C2; fewer than 1 in 10 were from SEG AB
- Mirroring this, over half were unemployed or retired, with around one third working full-time.

A clear majority of shoppers did one main shop per week, which they then topped-up on with visits like the one they were undertaking. However, one in five respondents made a number of small shops as the need arose. Indeed, 90% of shoppers visit the store a few times a week or more (over half visiting every day).

The survey found that 83% of the people visiting the store were the person in the household who tended to do most of the shopping, and that on average they spent £66 per week on food. The average spend in the store (pre-changes) was £7, with a third spending under £3.

The nature of top up shopping means that only 8% of shoppers purchased something spontaneously, the vast majority of purchases were pre-planned.

Before the in-store changes were implemented, 53% of customers said they would buy fresh vegetables and 44% said they would buy fresh fruit in that environment. On the other hand, 19% and 20% (respectively) reported that they would never buy these items there.

1.3. Main findings

Awareness of the in-store promotion
Once the promotion was in place, just under half of those interviewed reported having noticed a new promotion (unspecified), and this percentage remained fairly constant across the post waves. When asked if they had noticed a Change4Life promotion in post wave 2, almost two thirds (63%) had done so, however this percentage fell to 56% in the following wave.

The Change4Life promotion seemed to maintain a strong presence in Costcutter and Londis Wardley, but awareness in Londis Silksworth dropped off significantly between waves 2 and 3.

Impact on attitudes to fruit and vegetables and towards the store
The Change4Life programme has been successful in significantly improving perceptions of both the fruit and vegetable offer, and the store as a whole. Furthermore, the improvements seen immediately following the changes have been sustained to a good degree.

Looking at these results by store, changes to the fruit and vegetable offer had significant and greatest impact on customer views of the store in both the Londis sites, although both showed a slight drop off in the final wave. The improvements seen in Spar immediately following the changes have not been sustained, although scores are still significantly higher than before the changes. Costcutter is now rated similarly to before the changes, this partly due to the fact that it was already viewed very positively.

With regard to perceptions of quality and selection of fruit and vegetables, these have improved as a result of Change4Life. 68% of customers now feel the quality is at least comparable to their main store and this is a significant improvement post-test. Perceptions of selection did improve immediately following the changes, but these have since declined.

Impact on behaviour
The Change4Life programme appears to have significantly increased shoppers' likelihood to ever purchase fresh fruit and vegetables, although actual levels of purchasing 'on this occasion' have fallen away significantly since immediately after the in-store changes.

The proportion of shoppers citing 'this store' as their main store for buying fruit and vegetables is similar to levels seen before the changes and the proportion of occasions on which customers bought fresh fruit and vegetables from this store has fallen back to similar levels seen before the in-store changes. This would indicate that although increased consideration of the stores for fruit and vegetables has been maintained over the post waves, sustained behavioural change has not yet been achieved.

Significantly more shoppers (57% up to 73%) claim to be eating fruit or vegetables most or every day by post wave 3. The same is true of the numbers (23% up to 34%) claiming to eat 5 a day. Whether this indicates a change in attitude amongst the existing shoppers or a change in the profile of shoppers using the stores is open for debate.

The wider Change4Life campaign

In post waves 2 and 3, additional questions were asked around awareness of the Change4Life campaign outside these stores. 50% of customers were aware in post wave 2, but this fell to 38% by post wave 3.

However, around two fifths of those who were aware of the wider campaign claimed to be trying to eat more fruit and vegetables as a result. This was a significant increase between waves. In addition, although the majority would buy the same amount of fruit and vegetables from this store (77%) around 16% thought they would buy a little more.

Those customers aware of both the in-store and wider campaign are significantly more likely to think that eating fruit and vegetables is very important. However, there would appear to be little difference between those customers who have seen either or the in-store or wider campaign and those who've seen neither. This would indicate that the campaign is doing a good job of reinforcing the importance of a healthy diet amongst those who are already predisposed to this thinking.

This trend follows though into frequency of consumption and purchase, with those aware of both promotion and wider campaign claiming the highest levels.

1.4. Conclusions

Impact of the in-store C4L programme

The in-store programme has produced sustained levels of increased consideration of the pilot sites for fruit and vegetable purchasing. Since the changes there has been an increase in scores for the store:

- being a good place to shop for fruit and vegetables
- displaying fruit and vegetables in an appealing way
- offering a good selection of fruit and vegetables
- displaying fruit vegetables in a hard to miss location.

This is particularly the case amongst shoppers for whom these stores are their main source of fruit and vegetables.

More shoppers now say they 'ever' buy fruit and vegetables from the pilot stores and many of the barriers to buying fruit and vegetables from pilot stores have reduced.

There is some variation in impact by store. The programme has produced sustained levels of increased consideration across three of the pilot sites for fruit and vegetable purchasing; Londis Silksworth, Londis Wardley and Spar.

These stores demonstrate sustained increased scores on:

- being a good place to shop for fruit and vegetables
- displaying fruit and vegetables in an appealing way
- offering good selection for fruit and vegetables
- displaying fruit and vegetables in a hard to miss location

However, only in Londis Silksworth has sustained behavioural change been achieved where a higher proportion of customers ever buy fruit and vegetables than did before the changes.

Overall, the increased levels of purchasing seen immediately after the changes in the other stores seem to have fallen away to pre-test levels. Thus, although the store managers remain committed to the improved fruit and vegetable offer, and indeed do feel the produce is selling, claimed customer behaviour does not necessarily reflect this.

Costcutter in West Cornforth has been less impacted by the changes because customers already regarded this store highly in respect to fruit and vegetables. So, although customers did notice improvements immediately after the changes were introduced, overall they do not regard the store more highly now than they did before the promotion.

Impact of the C4L campaign
The campaign has achieved considerable awareness amongst these convenience store users, with 66% aware of in-store and/or wider campaign (although this has fallen from 70% in post wave 2).

Awareness of the campaign in-store fell slightly in the last wave; now competing for attention with price related promotions. Awareness of the campaign is higher amongst those for whom this is their main store for fruit and vegetables, as is their ability to name the campaign correctly.

Those aware of both the in-store and the wider campaign are slightly more likely to be eating '5-a-day', and buying fruit and vegetables slightly more frequently, both in general and from the pilot stores. They are also more likely to have bought fruit/vegetables on that occasion.

Around two fifths of those aware of the wider campaign are trying to eat more fruit and vegetables as a result. This rises to just over half of respondents for whom this is their main store for fruit and vegetables, with this group more likely to claim higher future increases in fruit and vegetable purchase at this store.

Talking to the shoppers in-depth
There is greater evidence of an impact on behaviour at a micro level. On deeper probing it becomes apparent that there are shoppers who are making more 'top up' purchases of fruit and vegetables as a result of the changes. This tended to be amongst people who find it difficult to get to a supermarket, for example those who might get taken once a month. Upon consideration they acknowledge that they now eat more fruit and vegetables as a result of the in-store changes.

For a small number of people the changes appear to have had a more significant impact on behaviour with the improved fruit and vegetable offer within the store facilitating a marked increase in their fruit and vegetable consumption. These cases demonstrate that the promotion can, when combined with a desire to change, result in a real rise in fruit and vegetable consumption.

2. Background and Objectives

The Convenience Stores Change4Life programme is a partnership initiative between the Association of Convenience Stores and the Department of Health which aims to increase the availability of healthy options in convenience stores, initially focusing on fresh fruit and vegetables.

The programme has several objectives, with those of greatest pertinence to this research being:

To increase sales of fruit and vegetables by focusing on improving range, merchandising, quality and communication in stores

To drive awareness of fruit and vegetables to the consumer through good signposting within retail stores facilitating the Change4Life brand.

The programme prioritises convenience stores in more deprived locations, where access to fruit and vegetables is more limited and key health indices are lower; thus the programme has the specific aim to reduce existing health inequalities.

More broadly, the Convenience Stores Change4Life programme sits within the Government's Healthy Weight: Healthy Lives strategy, which aims to reduce obesity levels in children to 2000 levels by 2020.

The North East region was been selected as the location for Phase 1 of the Convenience Stores Change4Life programme and an initial pilot across 12 development stores has been implemented.

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3. Methodology and Sample Profile

3.1. Quantitative Research; Methodology

The adopted approach was that of a classic pre and post test. Interviews were conducted in stores just weeks before the changes (Pre-test) and then immediately after the changes (Post-test Wave 1). This provided the Department with a picture of the pilot's immediate impact, but could not predict any longer term, sustained impression on shoppers' awareness or behaviour. With this in mind, two subsequent waves were conducted approximately 4 months and then 7 months after the in-store changes.

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The table below shows the number of interviews achieved in each phase of the study:

Pre-test	Post- test: Wave 1	Post- test: Wave 2	Post- test: Wave 3
n = 288	n = 285	n = 288	n = 282

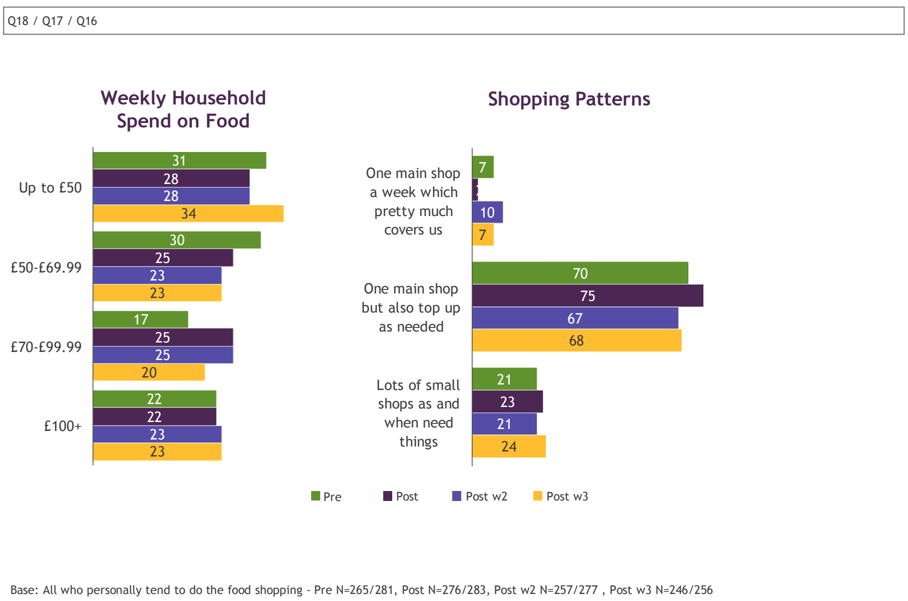
Shoppers were selected at random as they left the stores; the demographic profile of the shopper base remained broadly consistent across all 4 waves of the research.

Figure 1 - Demographics

Base: All - Pre N=288, Post N=285, Post w2 N=288, Post w3 N=282

A clear majority of shoppers did one main shop per week, which they then topped-up on with visits like the one they were undertaking. However, one in five respondents made a number of small shops as the need arose. Indeed, 90% of shoppers visit the store a few times a week or more (over half visiting every day).

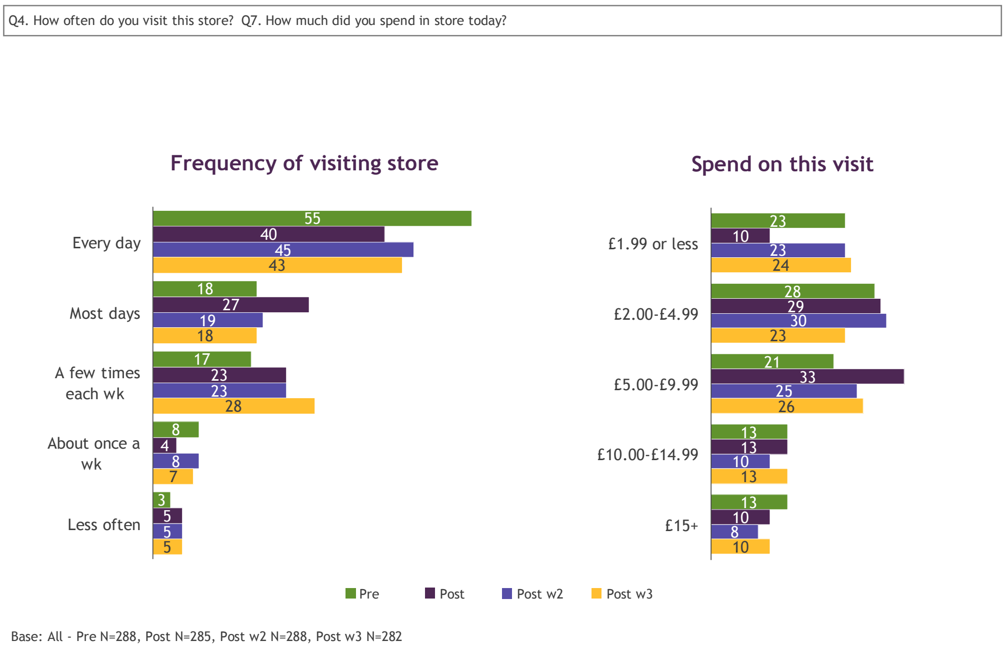
Figure 2 - Food shopping behaviour



The survey found that 83% of the people visiting the store were the person in the household who tended to do most of the shopping, and that on average they spent £66 per week on food. The average spend in the store (pre-changes) was £7, with a third spending under £3.

The nature of top up shopping means that only 8% of shoppers purchased something spontaneously, the vast majority of purchases were pre-planned.

Figure 3 - Frequency of visit and spend



3.3. Qualitative Research; In-store Immersions

A programme of qualitative research was conducted, to complement the quantitative survey.

Immediately following the changes a series of accompanied shops, intercepted interviews and observations was undertaken across 3 of the stores (Costcutter in West Cornforth was closed as a result of bereavement).

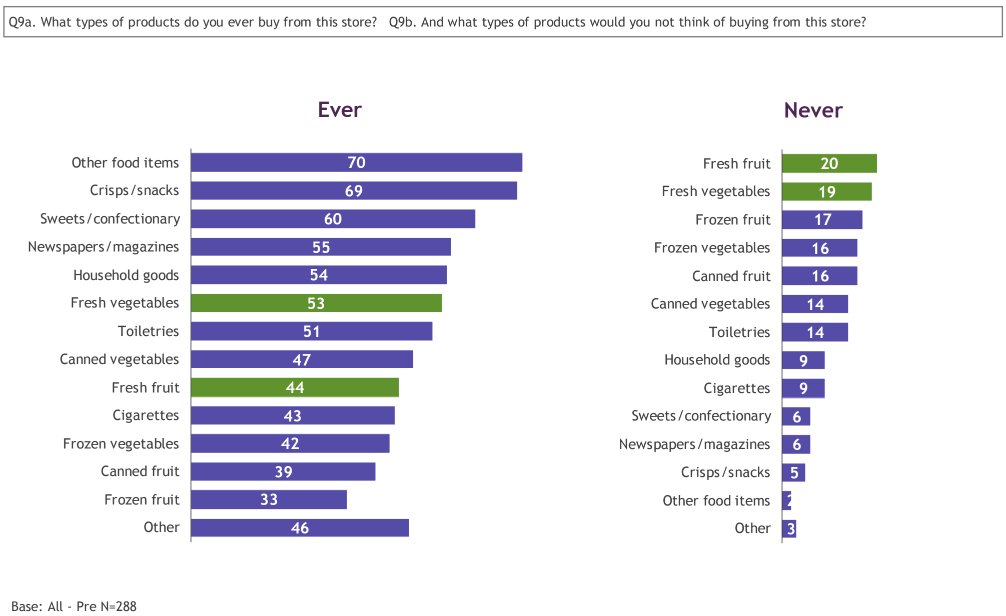
In post waves 2 and 3 intercepted interviews and observations were undertaken across all 4 stores.

4. Main Findings

4.1. Pre-test purchasing behaviour

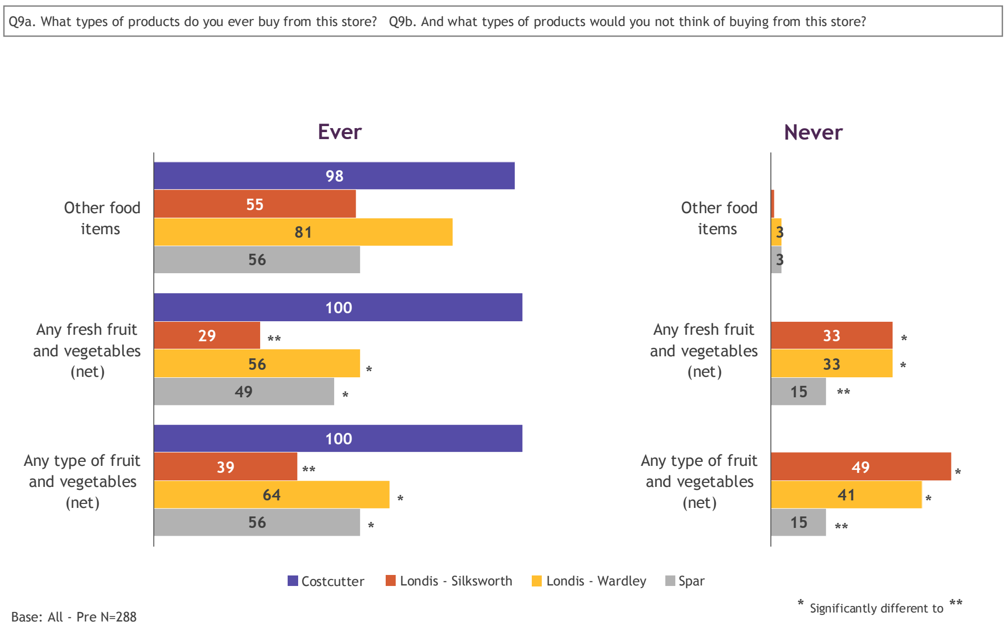
Before the in-store changes were implemented, 53% of customers said they would buy fresh vegetables and 44% said they would buy fresh fruit in that environment. On the other hand, 19% and 20% (respectively) reported that they would never buy these items there.

Figure 4 - Products bought from this store - prior to the in-store changes



There are, however, differences in behaviour by store with all Costcutter customers purchasing fresh fruit and vegetables along with other food items, even before the changes. Londis in Silksworth was significantly less likely to be used for fresh fruit and vegetables than the remaining stores.

Figure 5 - Products bought from this shop - Pre-test by store

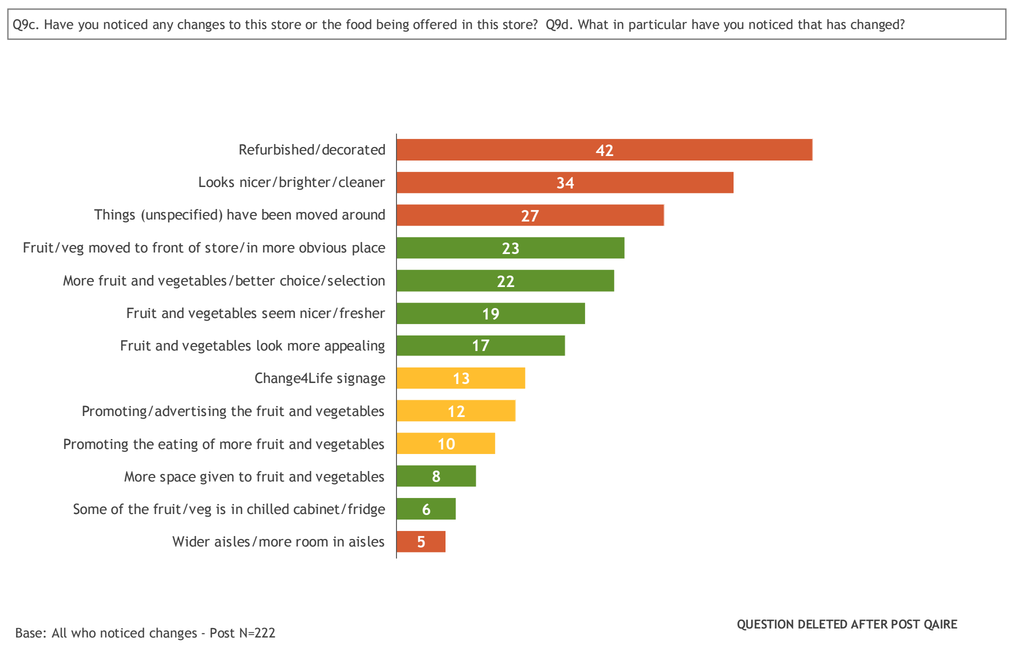


4.2. Post in-store changes

4.2.1. Awareness of changes

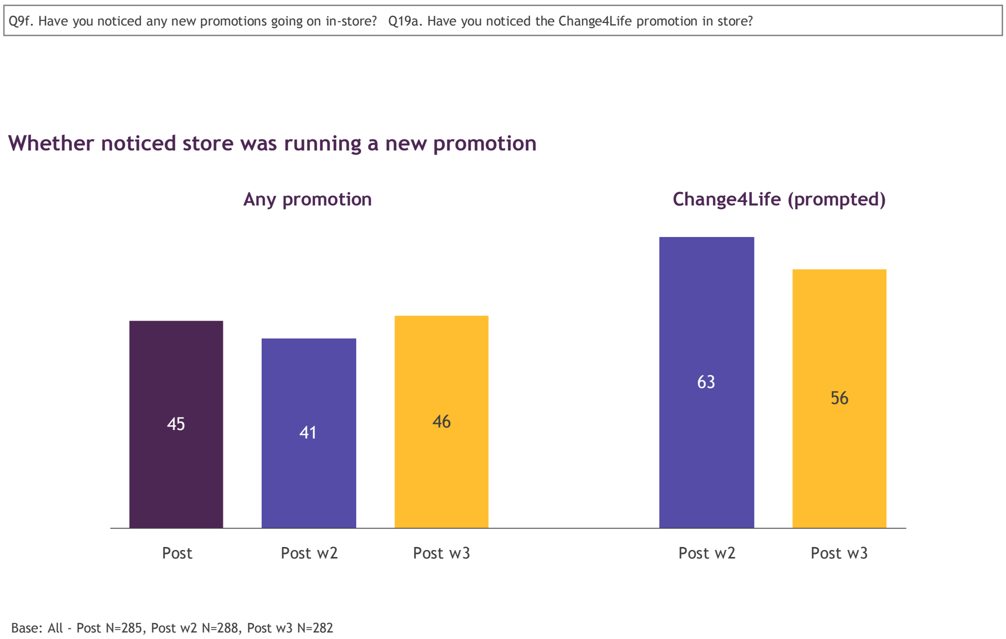
Immediately after the changes took place (Post-test: Wave 1 only), around three quarters of those interviewed had noticed the in-store changes and over half (58%) spontaneously mentioned changes to the fruit and vegetables.

Figure 6 - Changes noticed



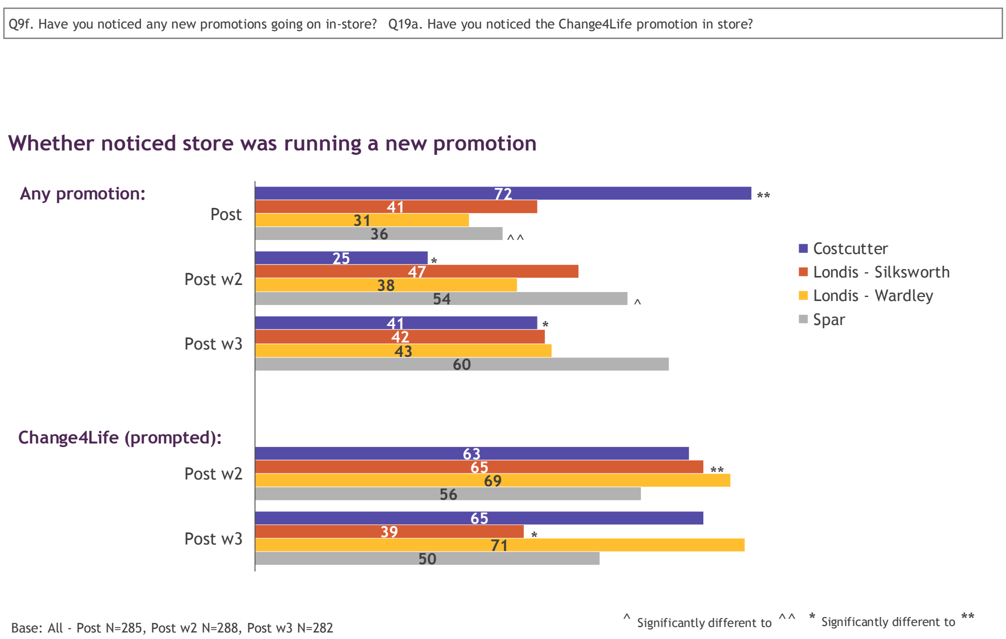
Respondents were then asked a series of questions focusing on any promotions they might have noticed (Post-Test - Waves 1, 2 &3). Just under half of those interviewed reported having noticed a new promotion (unspecified), and this percentage remained fairly constant across the post waves. When asked if they had noticed a Change4Life promotion in post wave 2, over two thirds (63%) had done so, however this percentage fell to 56% in the following wave.

Figure 7 - Promotions



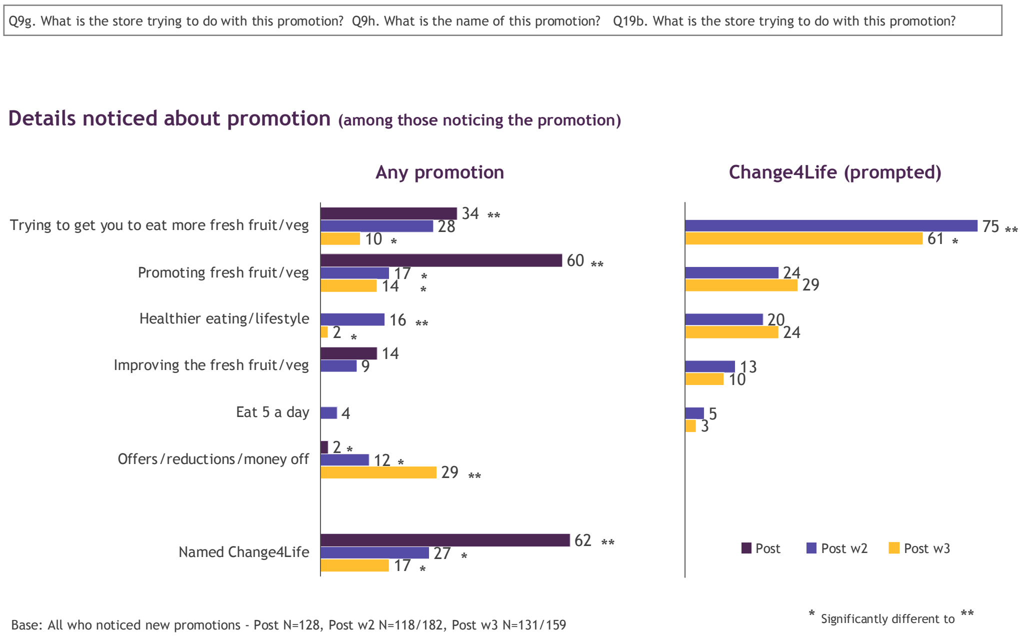
Again differences can be noted between stores as the Change4Life promotion seems to be maintaining a strong presence in Costcutter and Londis Wardley, but awareness in Londis Silksworth dropped off significantly between waves 2 and 3.

Figure 8 - Promotions by store



By post wave 3 (6 months into the campaign), price promotions were beginning to draw attention away from Change4Life, and the percentage of people mentioning Change4Life spontaneously dropped significantly from 62% in post wave 1 to 17% in post wave 3. However, the purpose of the campaign remains clear to shoppers.

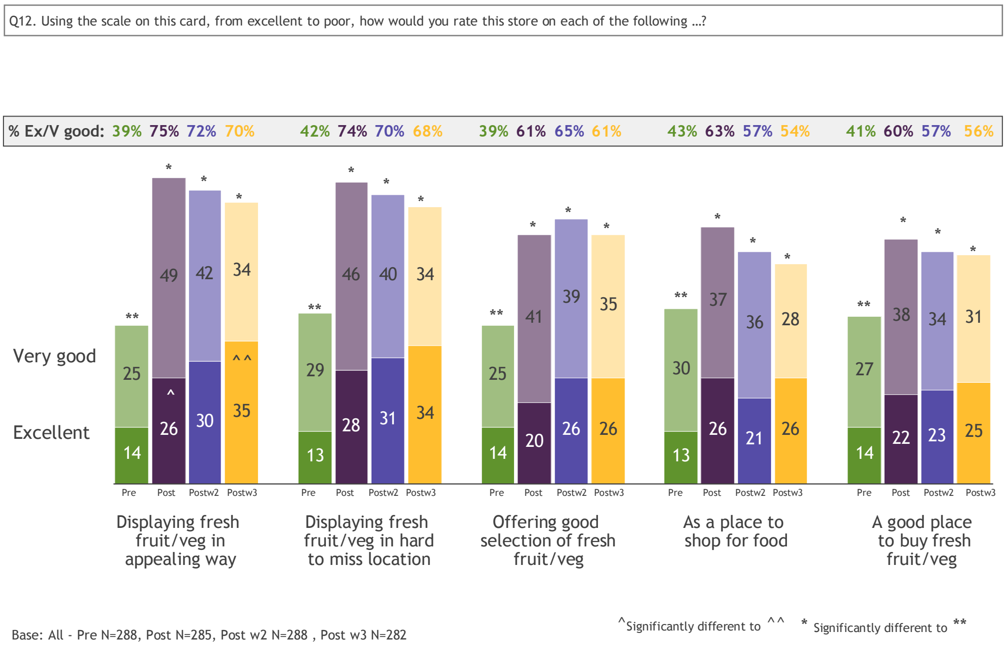
Figure 9 - Details noticed about the promotion



4.2.2. Impact on attitudes towards, and use of, store

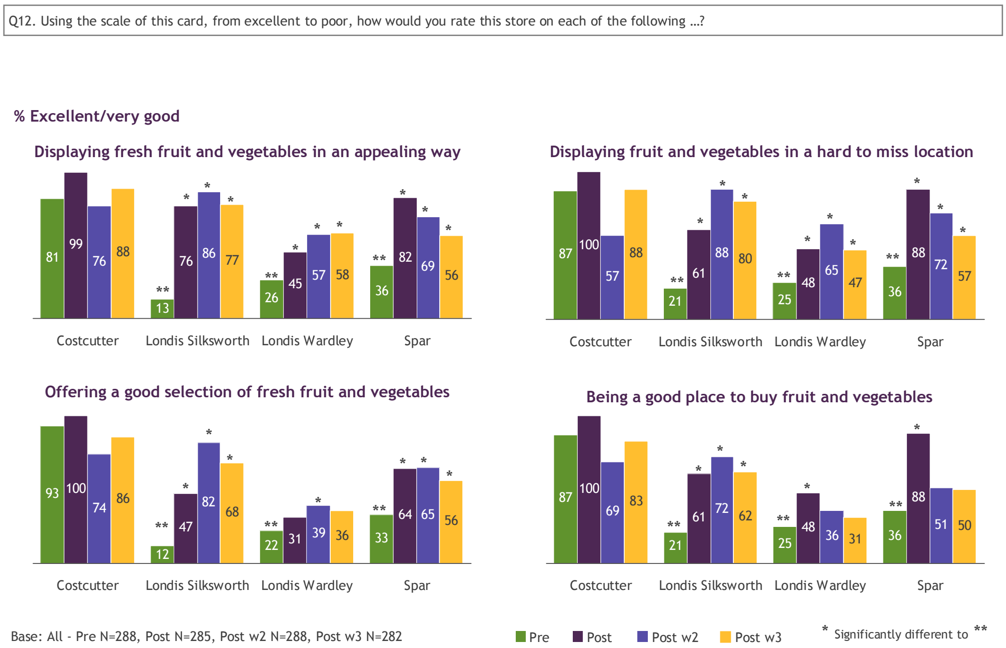
The Change4Life programme has been successful in significantly improving perceptions of both the fruit and vegetable offer, and the store as a whole. Furthermore, the improvements seen immediately following the changes have been sustained to a good degree.

Figure 10 - Overall opinions of the store



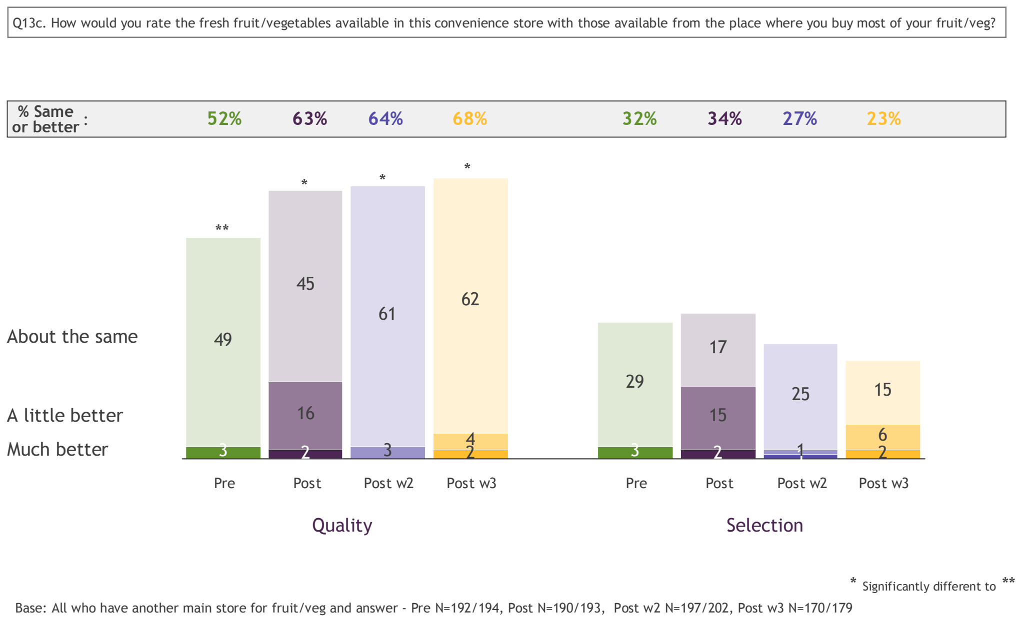
Looking at these results by store, changes to the fruit and vegetable offer had significant and greatest impact on customer views of the store in both the Londis sites, although both showed a slight drop off in the final wave. The improvements seen in Spar immediately following the changes have not been sustained, although scores are still significantly higher than before the changes. Costcutter is now rated similarly to before the changes.

Figure 11 - Overall opinions of store – by store



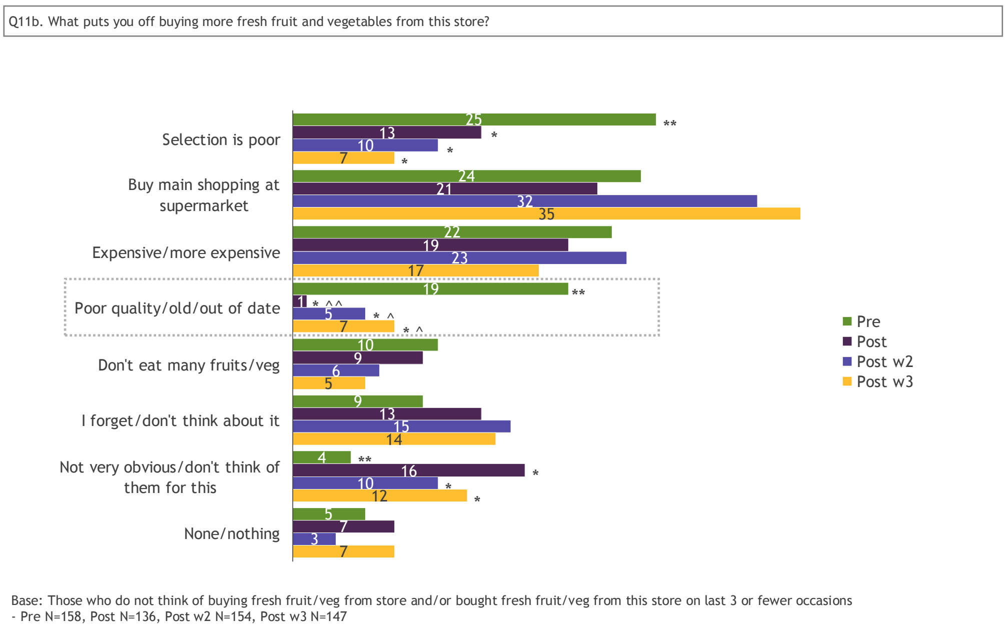
Turning now to perceptions of quality and selection of fruit and vegetables, these have both improved as a result of Change4Life. 68% of customers now feel the quality is at least comparable to their main store and this is a significant improvement post-test. Perceptions of selection did improve immediately following the changes, but these have since declined.

Figure 12 - Comparisons with main store for fruit/vegetable purchases



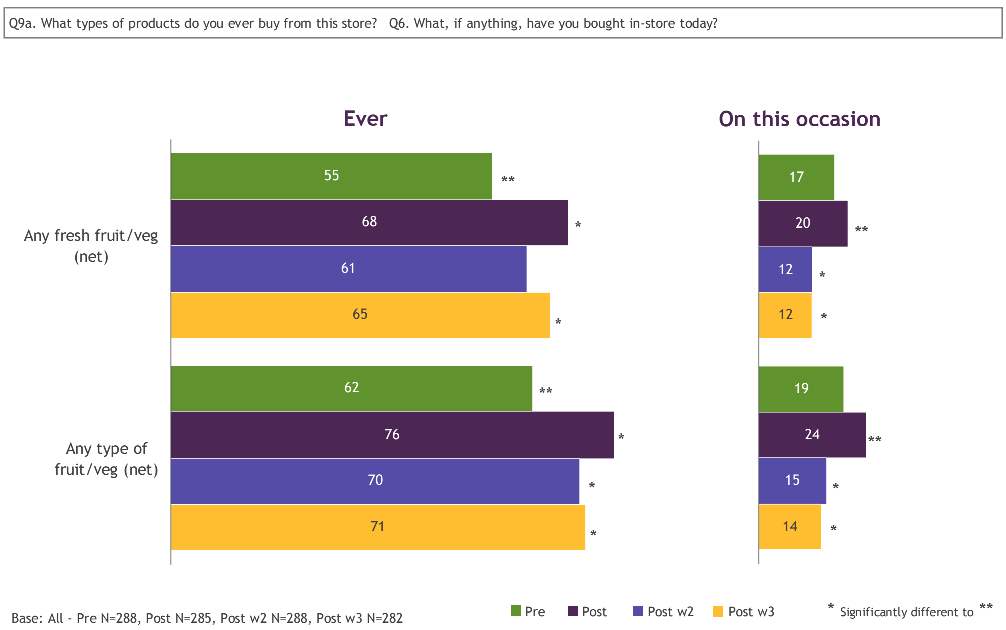
Customers were asked what put them off buying more fruit and vegetables from the store. Results show that the key remaining barriers are habitual purchasing at supermarkets as part of the main shop, and price. Poor quality is mentioned significantly more frequently now than was the case immediately after the changes, but still significantly less than before. Numbers citing a poor selection have also decreased significantly.

Figure 13 - Barriers to buying fruit and vegetables from this store



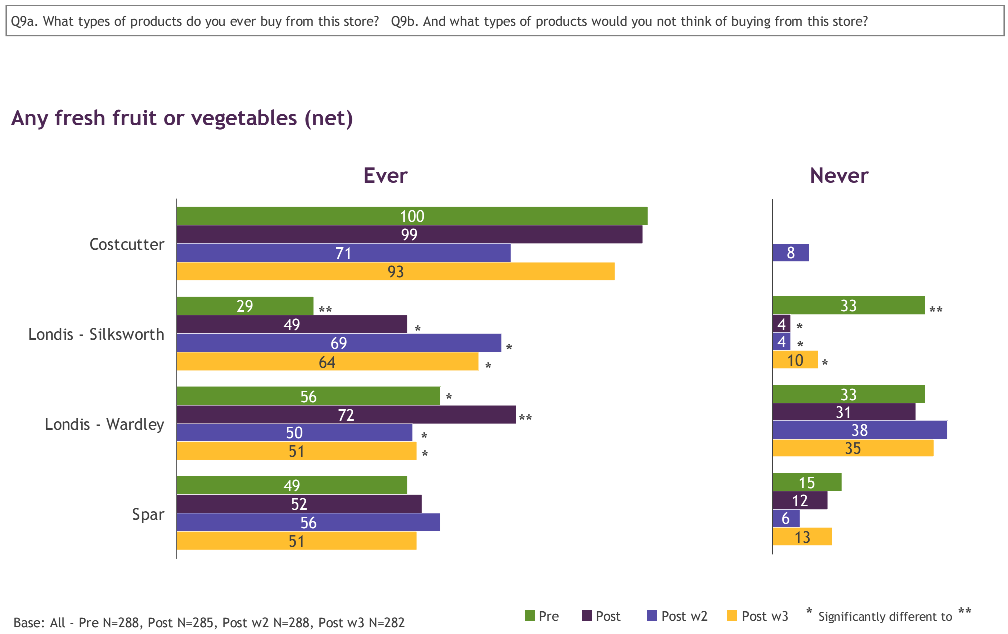
The Change4Life programme appears to have significantly increased shoppers' likelihood to ever purchase fresh fruit and vegetables, although actual levels of purchasing 'on this occasion' have fallen away significantly since immediately after the in-store changes.

Figure 14 - Products bought from this store



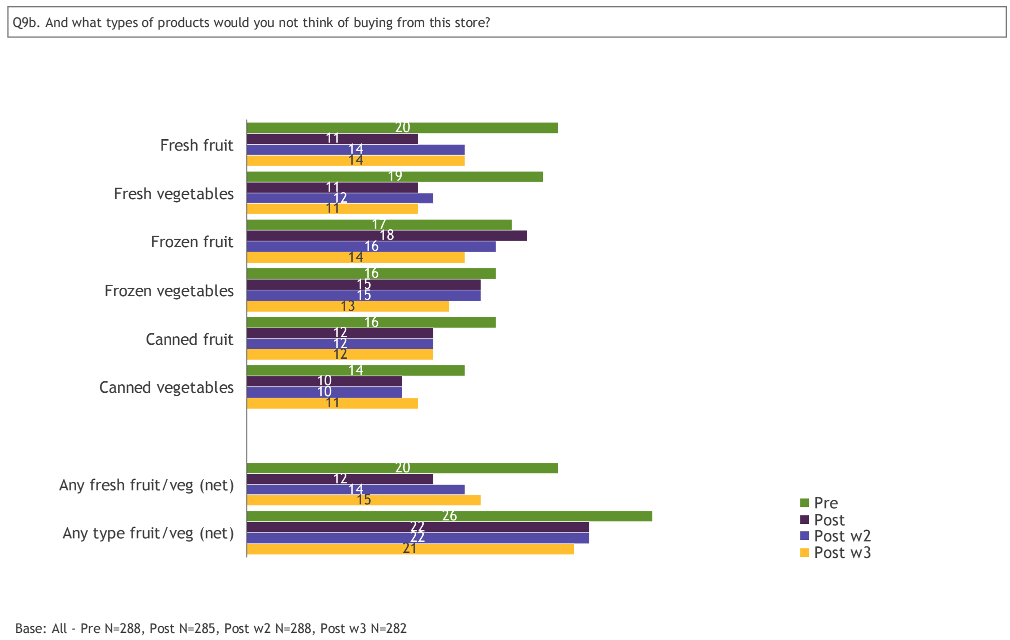
A closer look reveals that Londis in Silksworth leads the pack in terms of a sustained significant improvement in purchasing of fruit and vegetables.

Figure 15 - Products bought from this store - by store



Further evidence that the programme has changed attitudes can be seen in the reduced resistance to buying fruit and vegetables from these stores and this is being largely sustained over time.

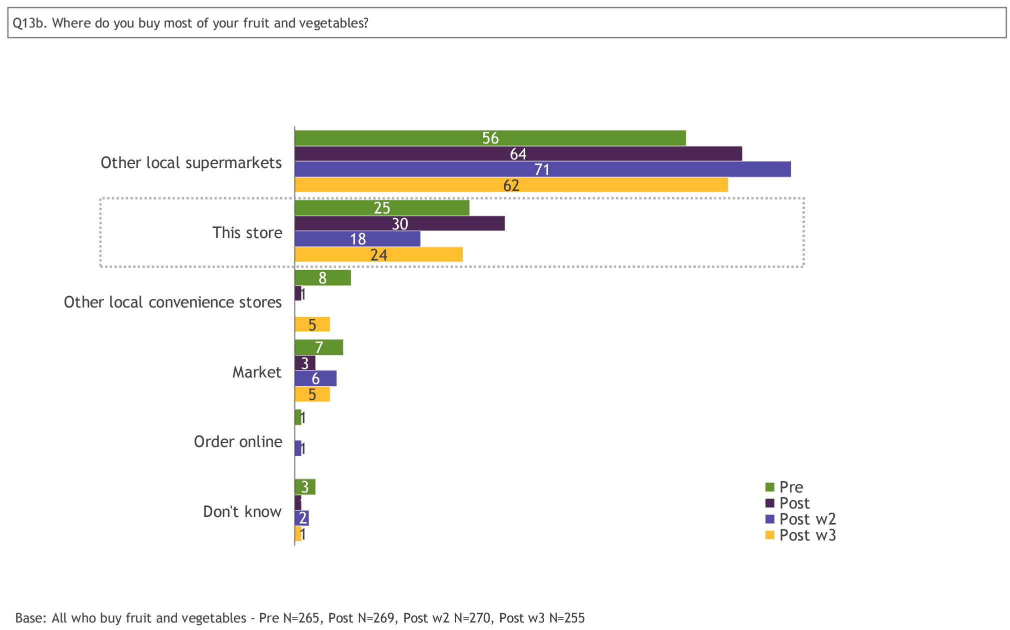
Figure 16 - Products wouldn't think of buying from this store



4.2.3. Impact on purchase of fresh fruit and vegetables

The proportion of shoppers citing 'this store' as their main store for buying fruit and vegetables is similar to levels seen before the changes.

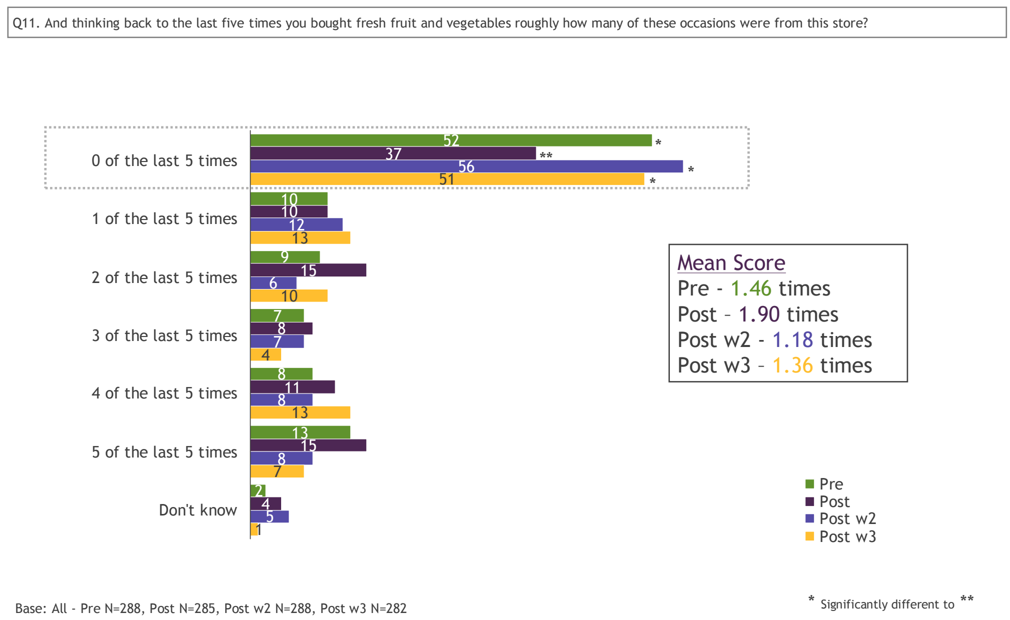
Figure 17 - Main store for purchase of fresh fruit and vegetables



However, within this there are remain differences by store. In post wave 3, 57% of Costcutter customers say it is their main store, whilst only 13% of Londis Silksworth, 12% of Londis Wardley and 11% of Spar, which is similar to before the changes.

In line with this, the proportion of occasions on which customers bought fresh fruit and vegetables from this store has fallen back to similar levels seen before the in-store changes. This would indicate that although increased consideration of the stores for fruit and vegetables has been maintained, sustained behavioural change has not yet been achieved.

Figure 18 - Proportion of occasions have bought fruit and vegetables from this store



Again, mean scores on this question for post wave 3 show that Costcutter customers are behaving differently to their peers frequenting the other chains:

Store	Mean Score Post Wave 3 (Q11)
Costcutter	3.23
Londis Silksworth	1.63
Londis Wardley	1.76
Spar	1.55

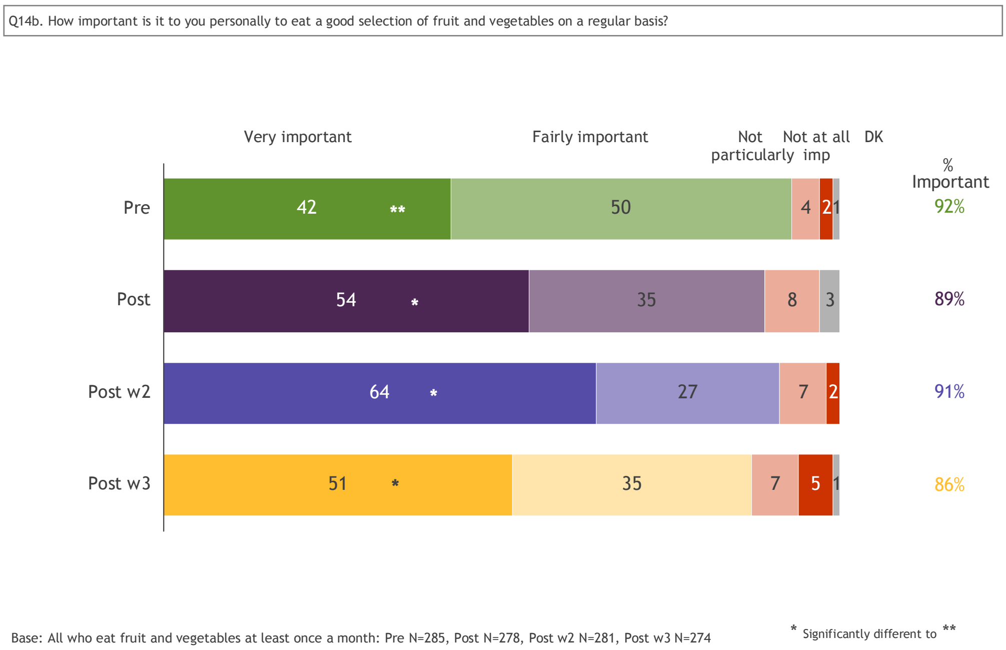
Unplanned purchasing has increased following the in-store changes and a proportion of this is fresh fruit (11%) and vegetables (5%).

Figure 19 - Unplanned purchases

4.2.4. Impact on attitudes towards, and consumption of, fresh fruit and vegetables

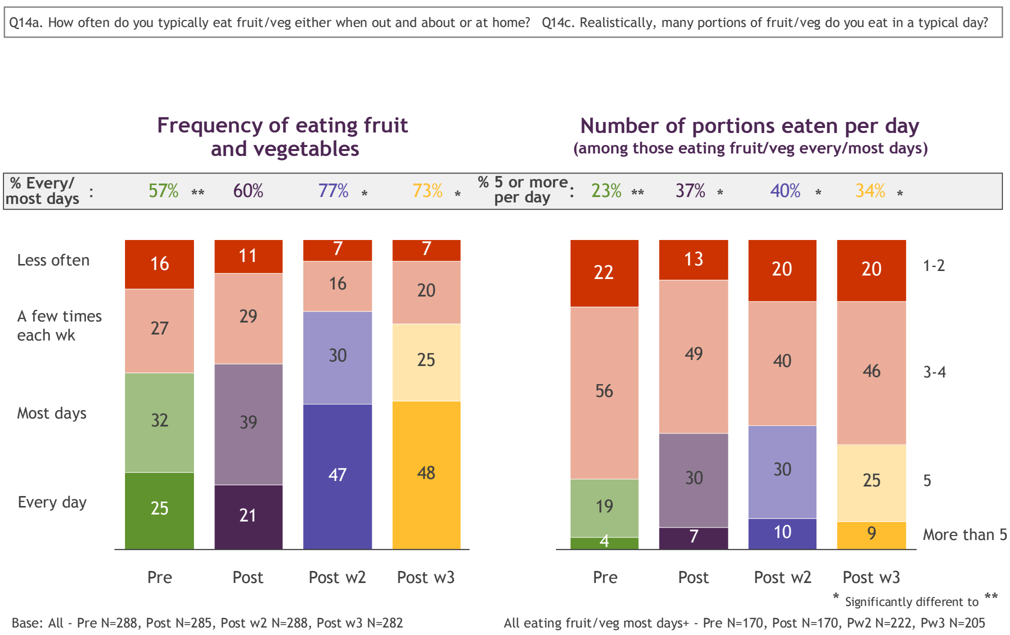
The vast majority of shoppers feel it is important to eat a good selection of fruit and vegetables and, following the changes, the stores seem to be attracting significantly more shoppers who feel it is very important to eat fruit and vegetables.

Figure 20 - Importance of fresh fruit and vegetables



Significantly more shoppers (57% up to 73%) claim to be eating fruit or vegetables most or every day by post wave 3. The same is true of the numbers (23% up to 34%) claiming to eat 5 a day.

Figure 21 - Claimed frequency of eating fruit and vegetables

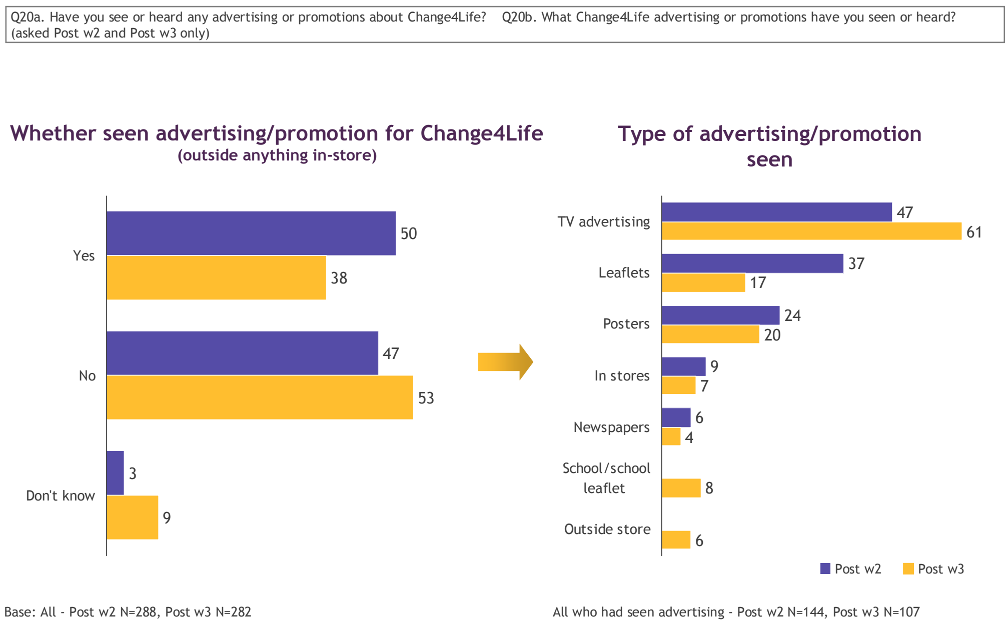


4.2.5. The wider Change4Life campaign

In post waves 2 and 3 additional questions were asked around awareness of the Change4Life campaign outside these stores.

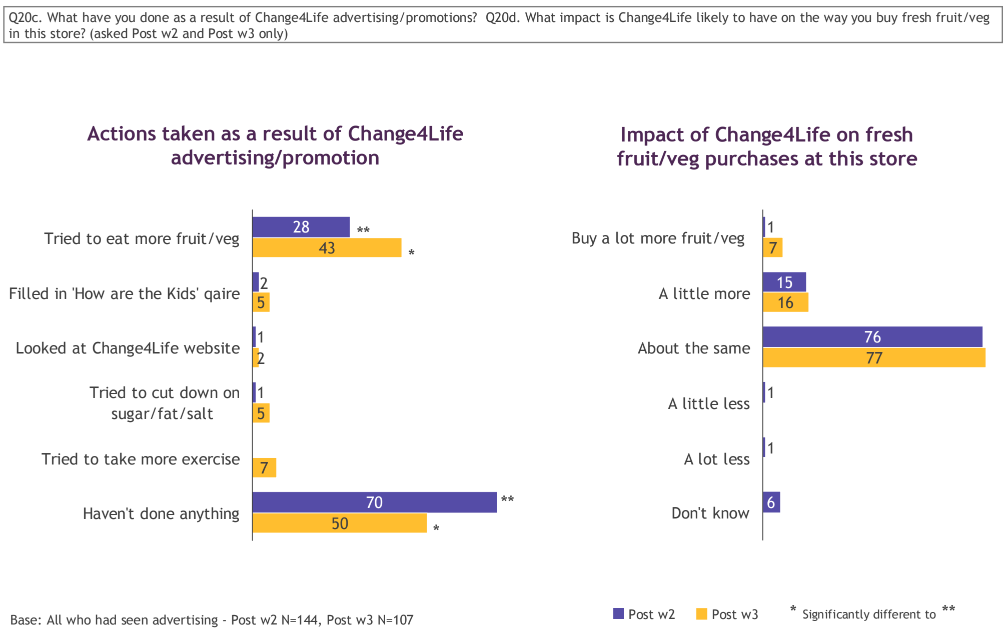
We found that awareness of the wider Change4Life promotion away from the store dropped off form 50% to 38% between these waves. Amongst those aware of a wider campaign, the most commonly recalled medium remains tv.

Figure 22 - The wider Change4Life campaign



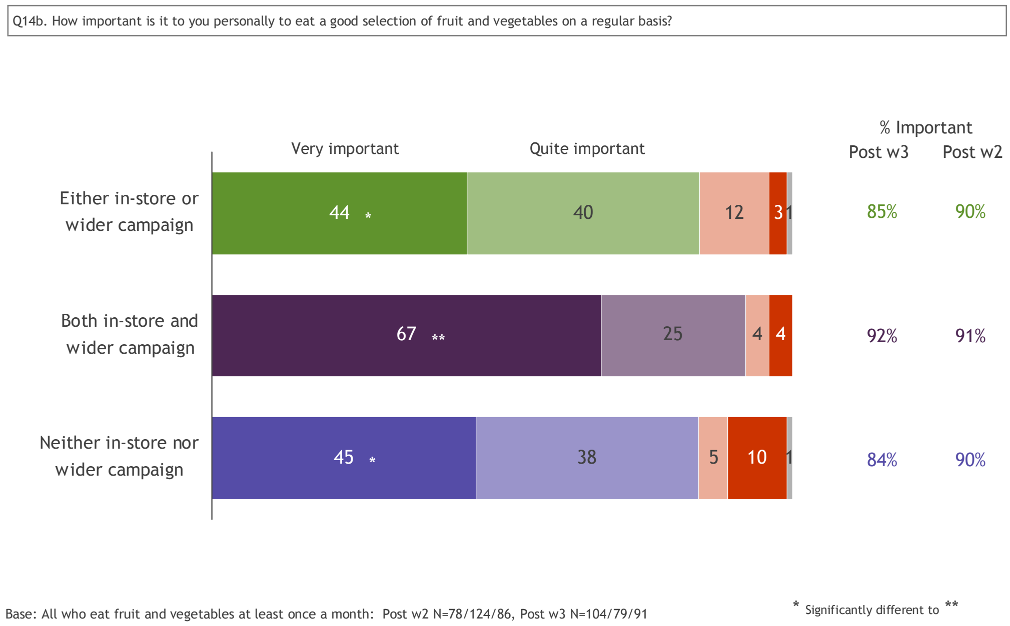
Around two fifths of those who were aware of the wider campaign claimed to be trying to eat more fruit and vegetables as a result. This was a significant increase between waves. In addition, although the majority would buy the same amount of fruit and vegetables from this store (77%) around 16% thought they would buy a little more.

Figure 23 - Wider Change4Life campaign impact



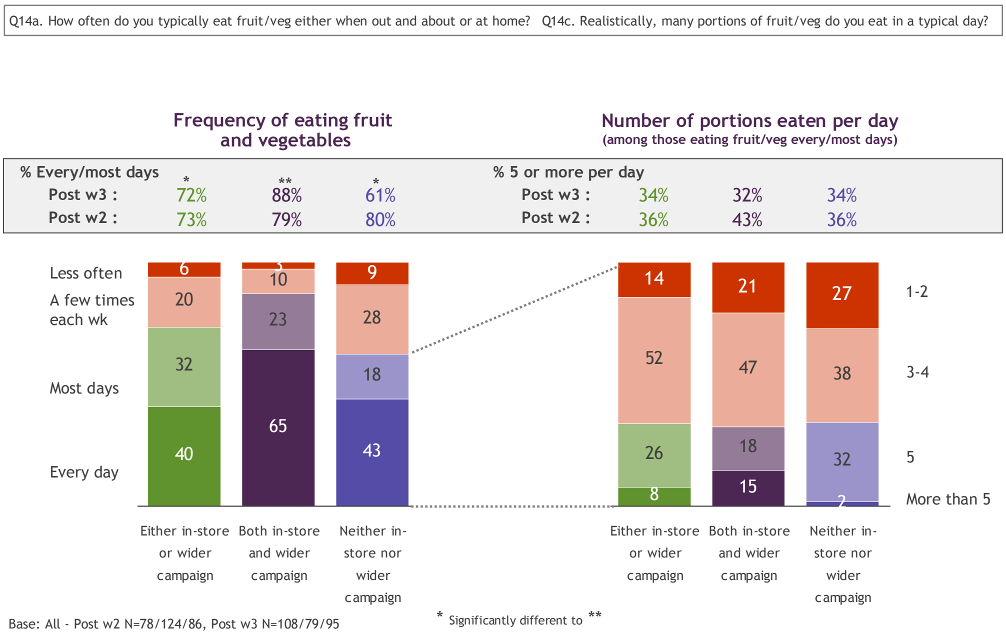
Those customers aware of both the in-store and wider campaign are significantly more likely to think that eating fruit and vegetables is <u>very</u> important. However, there would appear to be little difference between those customers who have seen either or the in-store or wider campaign and those who've seen neither. This would indicate that the campaign is doing a good job of reinforcing the importance of a healthy diet amongst those who are already predisposed to this thinking.

Figure 24 - Importance of fresh fruit and vegetables



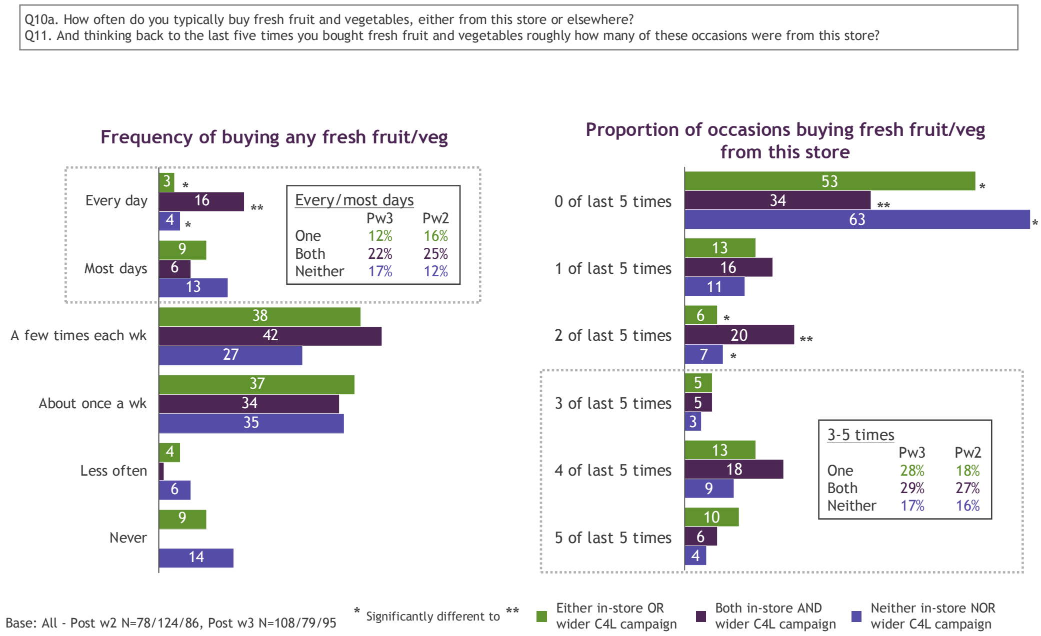
This trend follows on into claimed frequency of consumption of fruit and vegetables, with those aware of both the in-store and wider campaign significantly more likely to eat fruit/vegetables every or most days.

Figure 25 - Claimed frequency of eating fruit and vegetables



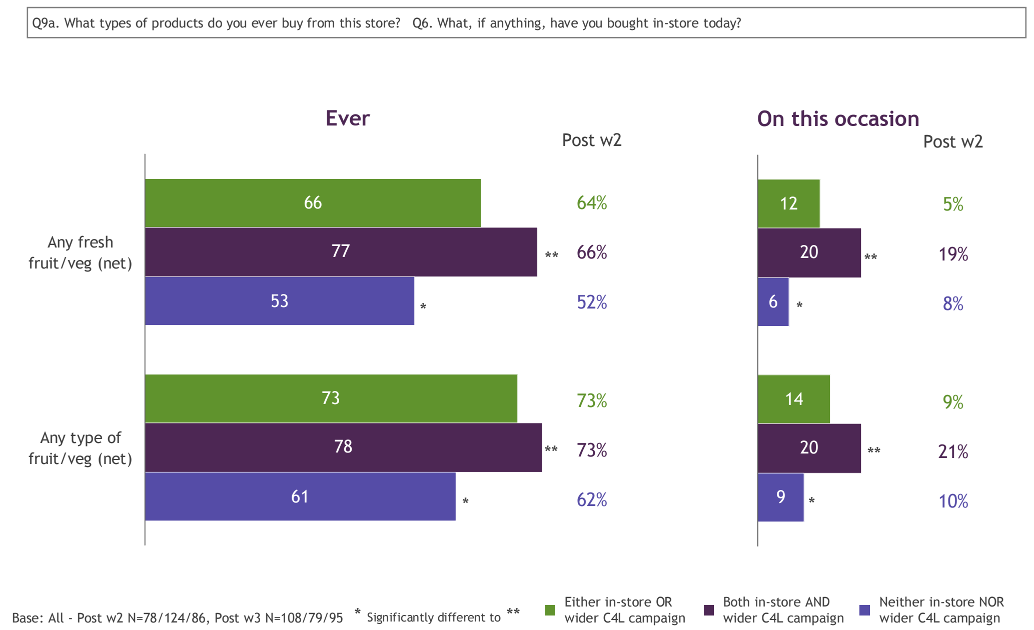
And those aware of both the in-store and wider campaign seem to be buying fruit and vegetables significantly more frequently overall.

Figure 26 - Proportion of occasions have bought fruit and vegetables from this store



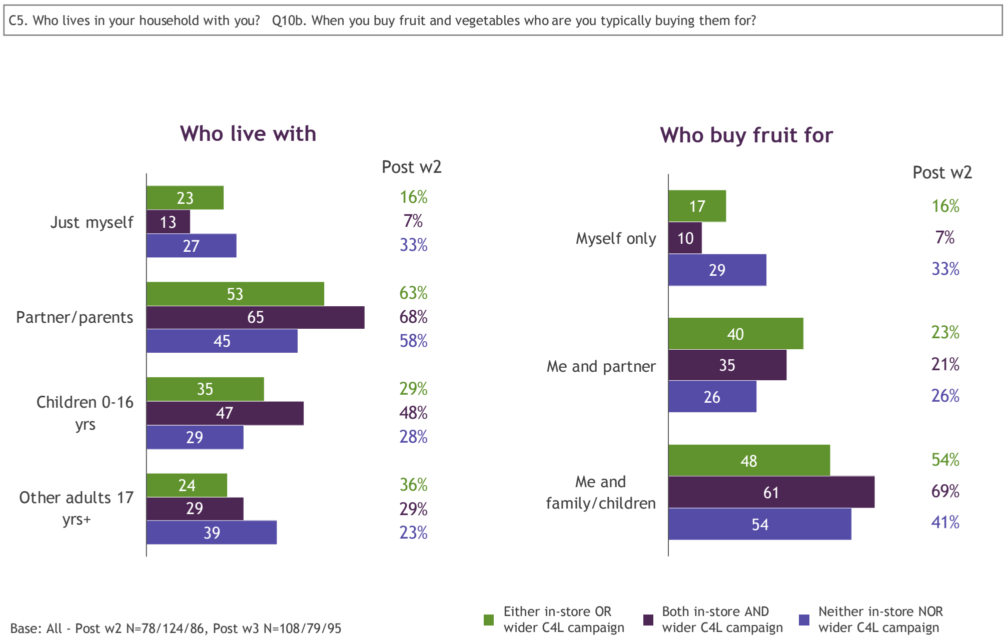
Furthermore, those who are aware of both the in-store Change 4Life campaign and the wider campaign are significantly more likely to have bought fruit and/or vegetables on that occasion; those aware of neither are less likely to have bought on that occasion or ever.

Figure 27 - Products bought from this store



Those aware of both the in-store and wider campaign are more likely to have children aged between 0-16 living with them and to be fruit and vegetables buying for them, as well as the rest of the household.

Figure 28 - Who buying fruit/vegetables for



4.2.6. Analysis of 'Convenience Store Main Shoppers'

In this section we look in more detail at any differences between those using these convenience stores as their main store for buying fruit and vegetables (Convenience Store Main Shoppers or CSMS) and those who do their main shop elsewhere. These results are based on post waves 2 and 3, with 108 respondents counting this as their main store, and 352 going elsewhere. Figures in brackets will always refer to those using convenience stores as their main shop first, followed by those going elsewhere.

Demographic profile

CSMS are more likely to be reliant on benefits, either because they are unemployed or retired, than the rest of the sample. They also number a higher proportion of retired and lone householders and are less likely to have regular access to a car.

Shopping behaviour

Amongst CSMS, 67% visited the store every day, compared to 36% of those whose main shop is elsewhere.

They are more likely to buy fresh fruit and vegetables (31% vs 8%), and spend a little more per visit (average £6.91 vs £6.53). Although bases become very small, of those people making unplanned purchases, a quarter of CSMS bought fresh fruit or vegetables, compared to 6% of those who do their main shop elsewhere.

One third of CSMS are buying purely for themselves (i.e. no other household members) as opposed to 14% in the other category.

Promotions

CSMS are more likely to have noticed new promotions (55% vs 42%) and to say that they were promoting fresh fruit and vegetables (31% vs 11%). 37% of them could name the promotion as Change4Life without prompting compared to 18% of their counterparts.

Overall opinion of the store

It's encouraging that the scores below show that CSMS are very positive about their store, particularly in relation to way it is selling fruit and vegetables. Indeed, they are driving up the total scores reported for post waves 2 and 3.

	CSMS	Main shop elsewhere
	% Very good or excellent	% Very good or excellent
Good selection of fruit and veg	94	55
Display fruit and veg in an appealing way	98	64
Being a good place to shop for fruit and veg	97	47
Display fruit and veg in a location that makes them hard to miss	86	65
Rating as a place to shop for food	95	45

The wider Change4Life Campaign.

There were similar levels of awareness of the wider campaign across each of the two subgroups (43% and 46% awareness).

A greater proportion (52% vs 30%) of CSMS reported that they had tried to eat more fruit and vegetables than their counterparts. Similarly they were more likely to claim they would buy a little or a lot more fruit and vegetables from this store (44% vs 14%).

5. Summary and Conclusions

5.1. Impact of the in-store C4L programme

The in-store programme has produced sustained levels of increased consideration of the pilot sites for fruit and vegetable purchasing. Since the changes there has been an increase in scores on the store:

- being a good place to shop for fruit and vegetables
- displaying fruit and vegetables in an appealing way
- offering a good selection of fruit and veg.
- displaying fruit veg. in a hard to miss location.

This is particularly the case amongst shoppers for whom these stores are their main source of fruit and vegetables.

More shoppers now say they ‘ever’ buy fruit and vegetables from the pilot stores and many of the barriers to buying fruit and vegetables from pilot stores have reduced.

There is some variation in impact by store. The programme has produced sustained levels of increased consideration across three of the pilot sites for fruit and vegetable purchasing; Londis Silksworth, Londis Wardley and Spar.

These stores demonstrate sustained increased scores on:

- being a good place to shop for fruit and veg.
- displaying fruit and veg. in an appealing way
- offering good selection for fruit and veg.
- displaying fruit & veg in a hard to miss location

However, only in Londis Silksworth has sustained behavioural change been achieved where a higher proportion of customers ever buy fruit and vegetables than did before the changes.

Overall, the increased levels of purchasing seen immediately after the changes in the other stores seem to have fallen away to pre-test levels. Thus, although the store managers remain committed to the improved fruit and vegetable offer, and indeed do feel the produce is selling, claimed customer behaviour does not necessarily reflect this.

Costcutter in West Cornforth has been less impacted by the changes because customers already regarded this store highly in respect to fruit and vegetables. So, although customers did notice improvements immediately after the changes were introduced, overall they do not regard the store more highly now than they did before the promotion. A higher proportion of customers use this store as their main store for fruit and vegetables than is the case in the other stores (w3 57% versus 11-13%); a higher proportion of customers are likely to ever buy fruit and vegetables from this store than the other stores (w3 93% versus 56-74%); and a higher proportion of customers say that out of the last 5 occasions they have bought fruit and vegetables, 4 or 5 of their purchases have been made in this store, than in the other stores (w3 60% versus 11-30%).

5.2. Impact of the C4L campaign

The campaign has achieved considerable awareness amongst these convenience store users, with 66% aware of in-store and/or wider campaign (although this has fallen from 70% in post wave 2).

Awareness of the campaign in-store fell slightly in the last wave; now competing for attention with price related promotions. Awareness of the campaign is higher amongst those for whom this is their main store for fruit and vegetables, as is their ability to name the campaign correctly.

Those aware of both the in-store and the wider campaign are slightly more likely to be eating '5-a-day', and buying fruit and vegetables slightly more frequently, both in general and from the pilot stores. They are also more likely to have bought fruit/vegetables on that occasion.

Around two fifths of those aware of the wider campaign are trying to eat more fruit and vegetables as a result. This rises to just over half of respondents for whom this is their main store for fruit and vegetables, with this group more likely to claim higher future increases in fruit and vegetable purchase at this store.

5.3. In-store immersions

There is greater evidence of an impact on behaviour at a micro level. On deeper probing it becomes apparent that there are those buying more 'top up' purchases as a result of the changes. This tended to be amongst people who find it difficult to get to a supermarket, for example those who might get taken once a month. Upon consideration they acknowledge that they now eat more fruit and vegetables as a result. In a small number of cases it appears to have had a more significant impact on behaviour with the store now being used for most of their shopping.

In these cases the promotion can, when combined with a desire to change, result in a real rise in fruit and vegetable consumption.

6. Contact and Corporate Details

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